Notes from SAM Refresher Training
June 7, 2006

Open discussion:

Q: VCU – When we do search under Administration, Organization, we can search for a cardholder to see what folder they are in within our hierarchy?
A: Yes, by selecting the search from the options drop down menu, you can search for cardholders/users. Enter their name or part of their name and click Find, and SAM highlights in red any matches.

Q: VCU – When I go under Administration, Cardholder, then click on Search, it always comes up with a set of criteria there which I have to clear out to see what I want. How do I fix that?
A: The criteria that you see are set as a default so you need to clear the search criteria out, click on the "clear" button on the search screen to clear the criteria. Once its blank, hit the "save" button at the bottom. A new screen will appear with a box to check as "default". By checking the box and hitting "save" again, that will ensure that when you hit the "search" button, it will be blank in the criteria section and it will pull all cards in your agency, i.e. open and closed.

Q: DMV – Any plans to link NetService and SAM so that a change you make in NetService appears in SAM right away?
A: This has been requested by other clients and is on a list of possible enhancements. Just keep in mind that if you make a change in NetService today, that SAM is only updated weekly at this point; therefore, there will be a delay in when you see that change in SAM. Anytime you need to make a change on an account, you should always link over to NetService so that it is made real time.

Q: DMV – In SAM, do you suggest we use the previous button in SAM or use the Windows Back button?
A: You should always use the buttons in SAM rather than any Microsoft Windows.

Q: DMV – When you run a canned report and export to excel, it exports all the header and footer information. Is there any way to just download the data without having to go into the Query Builder to build the same data?
A: No, a canned report exported to excel will always have the header and footer data. DOA has requested as an enhancement that in the Reports section, if you choose excel as the format to export to, it dumps the data without all the extra header and footer data, just with one row of headings. The request was made that if the format to export to was PDF or Word, it would have all the header and footer information.

Q: DMV – Is the scheduling functionality the same in queries and reports?
A: Yes, the functionality of saving and scheduling a report and query are the same.

Q: VCU – Is there a limit as to how many saved queries and reports a login can have?
A: GE will verify.

Q: VCU – Is there any way to see the memo's noted when you make any changes to a cardholder's account online?
A: Currently no but with the upgrade in July, you will be able to see any memo's left for any changes made to a cardholder's account.

Q: DMV – Can you build a report to only show cardholders are active? If I put a card as canceled in the cancelled folder, it still shows?
A: If you are using a canned report, it will pull all cards, cancelled and active. If you are running a query, you can add criteria in to exclude cards with a credit rating of V7 and V9. If you have cancelled cards which you want removed from your hierarchy, if you provide to DOA the cardholder's name and last 6 digits of their card number, DOA will move the cards out of your hierarchy into a mass cancelled card folder at DOA and leave the transactions associated with the card in your hierarchy for historical reporting.

Q: DMV – Will the corporate billing account always show up on our card listings?
A: Yes, if you are running a report to get a card count, always subtract 1 for the billing account number. If you are running a query, you can always add a criteria of credit limit less than $500,000 which will exclude your billing account since that has a higher credit limit.

Q: VCU – I have seen cards which I have cancelled in NetService which still show with their old credit limit in SAM. How can that be?
A: Due to SAM being uploaded weekly it could be a timing issue, but to monitor it and alert DOA if that occurs again.

REMINDER:

June's PA Call is June 14th at 10am

July's SAM Refresher Training is July 5th at 10am